Blood Cancer UK Grants Portal: Guidance for New Users

What is the Blood Cancer UK Grants Portal?

- The Blood Cancer UK Grants Portal is our new online grants management system. It can be accessed at:

  https://funding.bloodcancer.org.uk/

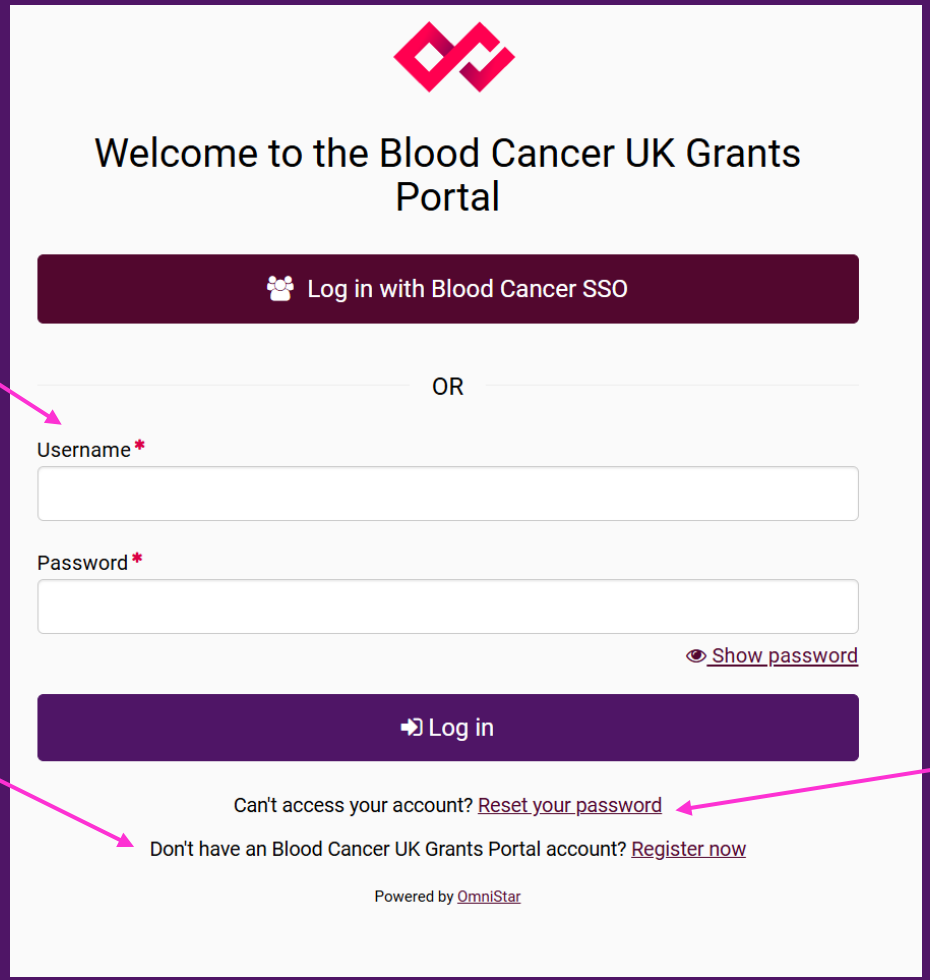
- It will replace our previous system, Grant Tracker, which will be fully discontinued by December 2026.
- The new Blood Cancer UK Grants Portal is open for the development and submission of all new funding applications.
- This guidance outlines how to get started on the new portal and how to submit a funding application.
- All existing grants will continue to be managed through Grant Tracker until later in the year when these will be migrated to the new portal.
- Additional guidance on managing your active grants through the new portal will be provided at that point.

Navigating the Login page

If you have logged to the Grants Portal before simply add your username (email) and password here and click Log in

<u>FIRST TIME USERS</u>

If you **<u>do not</u>** have an existing Grant Tracker account, the first time you navigate to the login page you will need to register for an account by clicking this link.



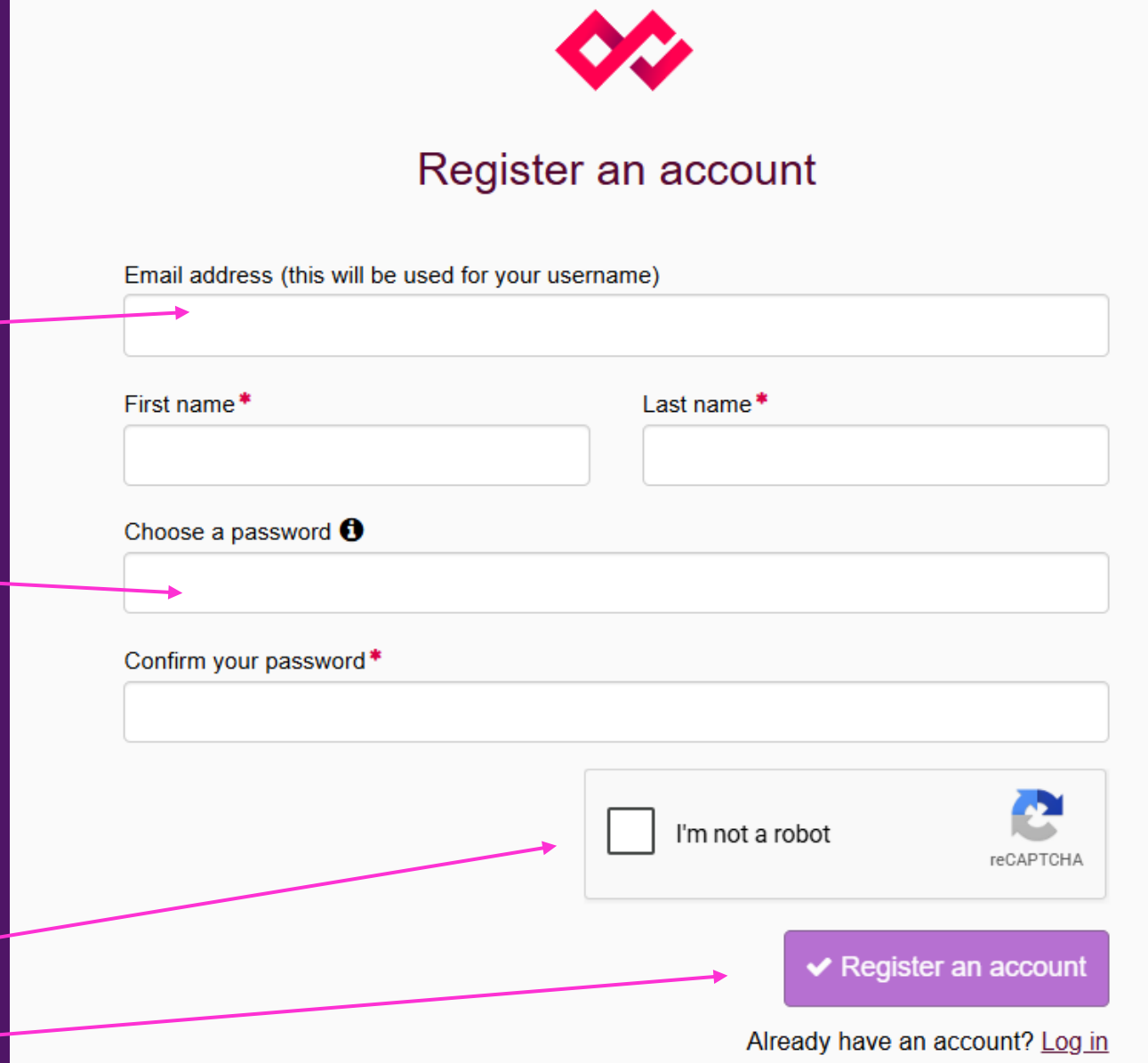
<u>FIRST TIME USERS</u>

If you **<u>do</u>** have an existing Grant Tracker account, the first time you navigate to the login page you will need to reset your password here to set up a new password for the Grants Portal. Your existing password for Grant Tracker will remain unchanged.

If you ever forget your password, you can always reset it here.

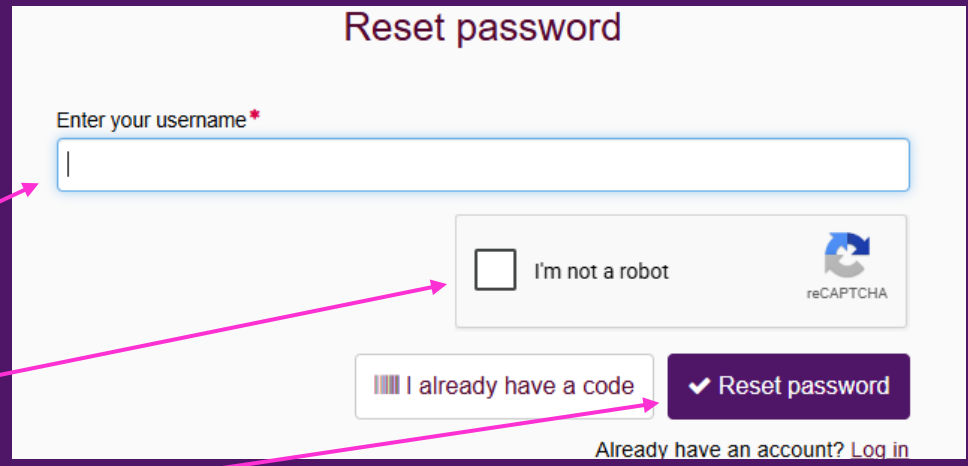
Registering for an Account

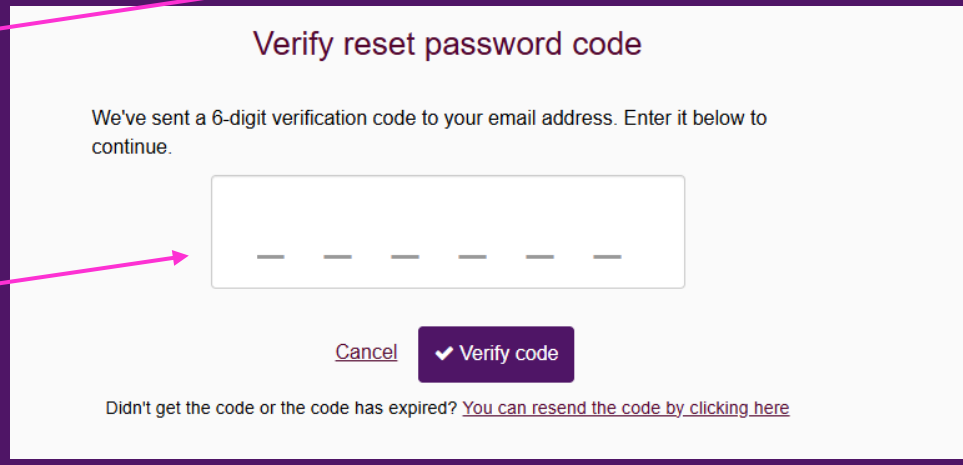
1. On the registration page please fill in the required fields – if information is missing, the system will provide guidance in red text underneath the question.
2. Choose a password:
   - Passwords must be at least 10 alphanumeric characters.
   - They must contain at least one symbol.
   - They must include at least one numeric value.
   - They must contain both uppercase and lowercase letters.
   - Users cannot reuse a password. It must contain at least 3 different digits to a previous password.
3. Click the I'm not a robot button
4. Click this button to register your account

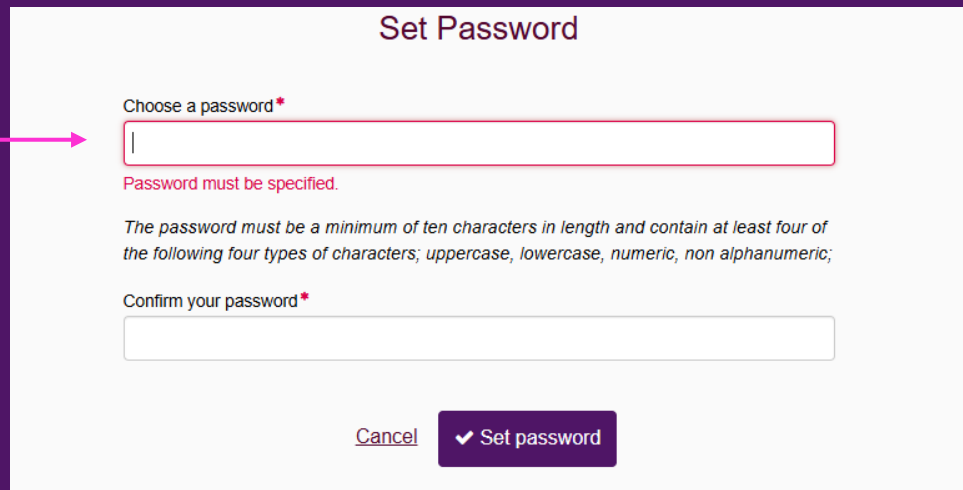


Resetting your password

1. Enter your username (email address)
2. Click I'm not a robot
3. Click reset password
4. You will be emailed a 6-digit code which you need to fill in on the next screen within 15 minutes
5. Once you have submitted the code you will be taken to a screen where you can reset your password following the requirements described in the previous slide







Navigating the System – The Menu Bar (part 1)

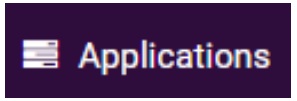
The left-hand side of the menu bar has the following functions:

Home Page Link

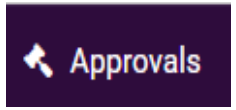
You can navigate back to your homepage from anywhere in the system by clicking here.

Main Portal sections

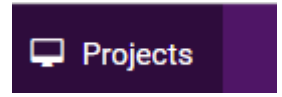
Use these menu items to navigate the different modules in the system. Depending on your role and whether records have been shared with you, options in the menu may be shown or hidden. Currently you may only see 'applications' until you have active approvals or projects:



From here you can manage all applications you have created or that have been shared with you.



If you are added to an application as a Department Head or Head of Research Office, you will be required to approve the completed applications before they are received by Blood Cancer UK.



This module will be activated later in the year.

Navigating the System – The Menu Bar (part 2)

The right-hand side of the menu bar has the following functions:

Search

You can search your portal using key terms including application, grant reference or keyword from the title.

User Profile

You can update your profile, user settings, password etc. here.

Notifications

All notifications and emails you receive through the portal can be accessed here.

Tutorial

Each time you navigate to a new section of the portal a tutorial will play highlighting the key features. This will not autoplay again but if you want to access it on future visits you can press the play button on the menu bar of the relevant page.

Help

If there is additional page specific help available, it can be accessed here.

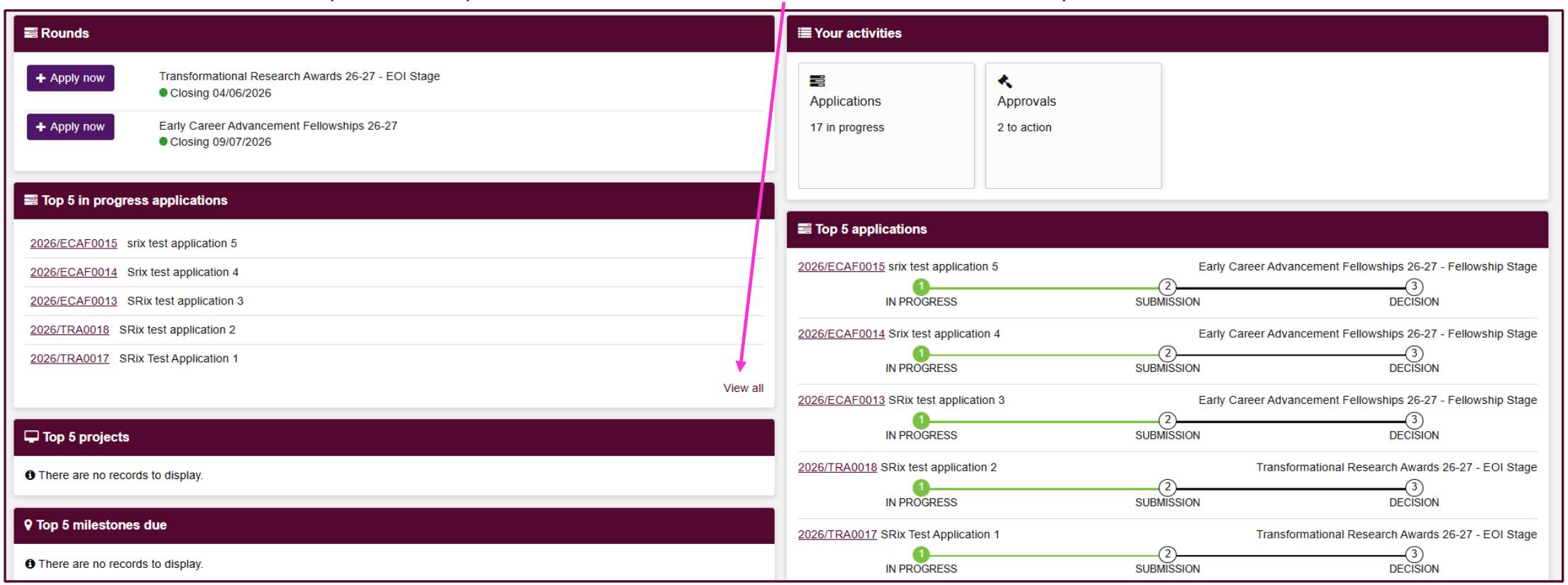
Navigating The System – Your Homepage

Within your homepage you have the following key sections:

Rounds: all currently open funding calls. You can start a new application to any call by clicking 'apply now' against the relevant round. You can download the guidance document for the round by clicking on the title of the round.

- **Top 5 in progress applications:** the latest 5 applications you are currently involved in that have not yet been submitted.
- **Top 5 projects:** the most recent 5 active grants you are involved in – this will be activated later in the year.
- **Top 5 milestones due:** in the system all activities within the project are called milestones, this includes progress reports and financial claims. This section shows the most recent 5 milestones that are upcoming for your active grants this will be activated later in the year.
- **Your activities:** key elements that need your attention. You can click on the boxes to be taken to a more detailed list.
- **Top 5 applications:** the last 5 applications you have been involved in showing their progression stage (in progress/submitted/decision).

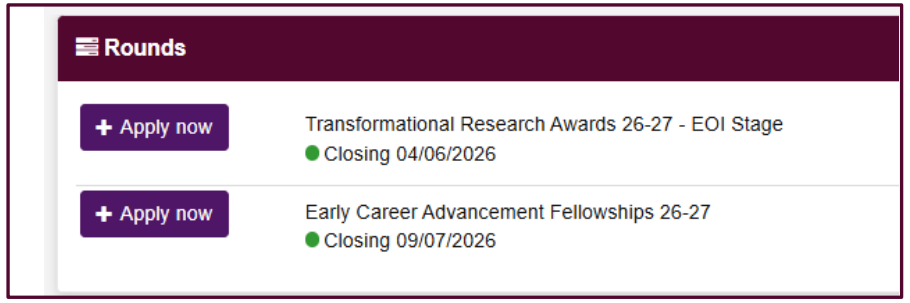
If there are more than 5 items in in any of these 'top 5' sections, there will be a 'View all' button that shows you the full list.



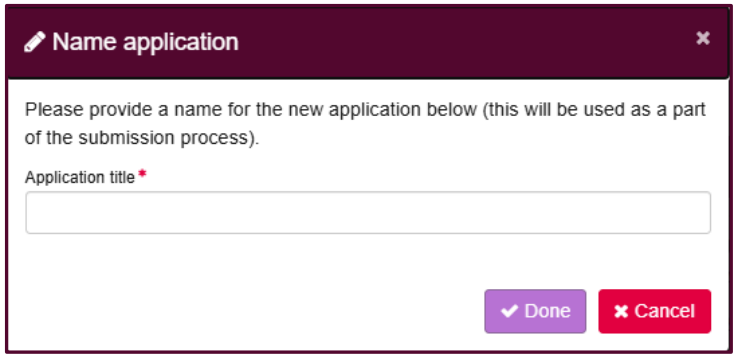
Starting a new application

All new applications must be completed by the Lead Applicant.

1. Navigate to your homepage and click ‘apply now’ next to the grant scheme of interest.



2. A popup will appear that asks you to name the new application. Fill in the title and click done.



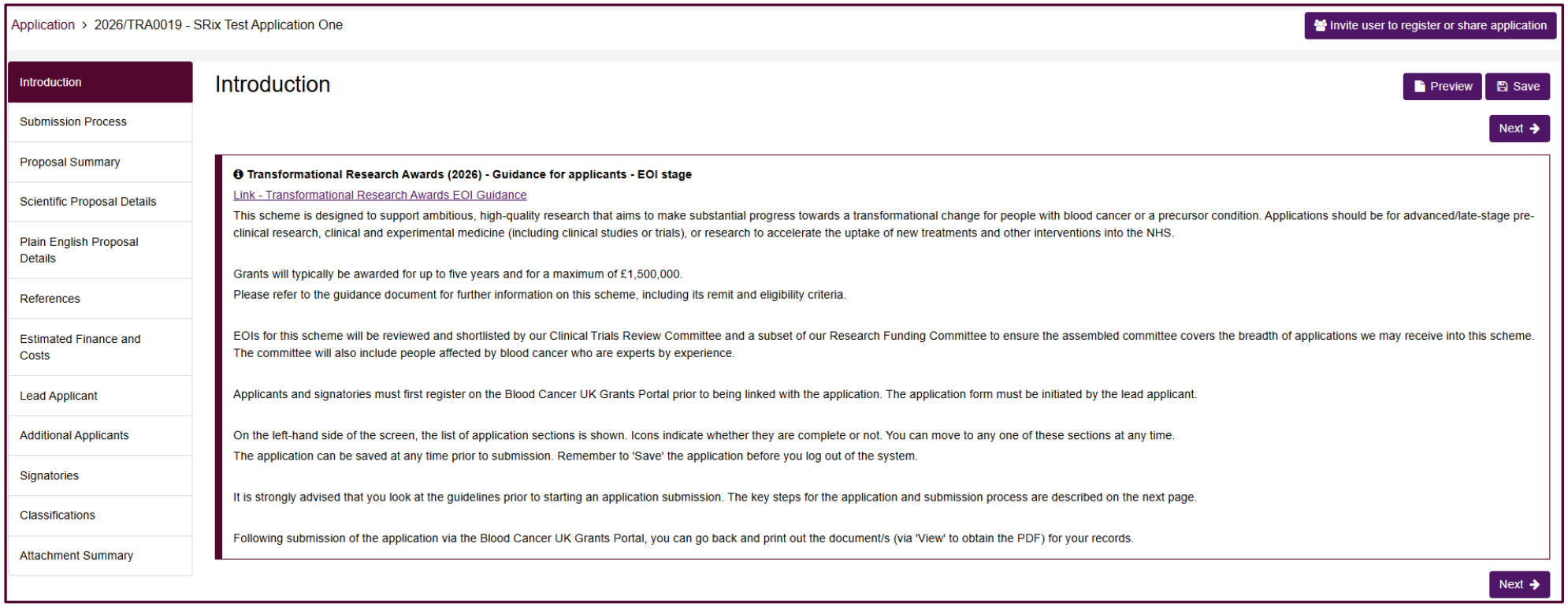
3. The application form will then automatically open.

Navigate through the pages by clicking the sections listed in the menu on the left or by using the previous/next buttons at the bottom of the page.

The form autosaves as you navigate through it.

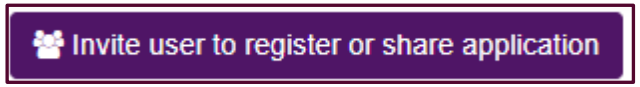
If you want to leave and come back later click ‘Save’ at the top of the screen.

To edit the application again later, search for it from the menu bar or access it through the applications section.

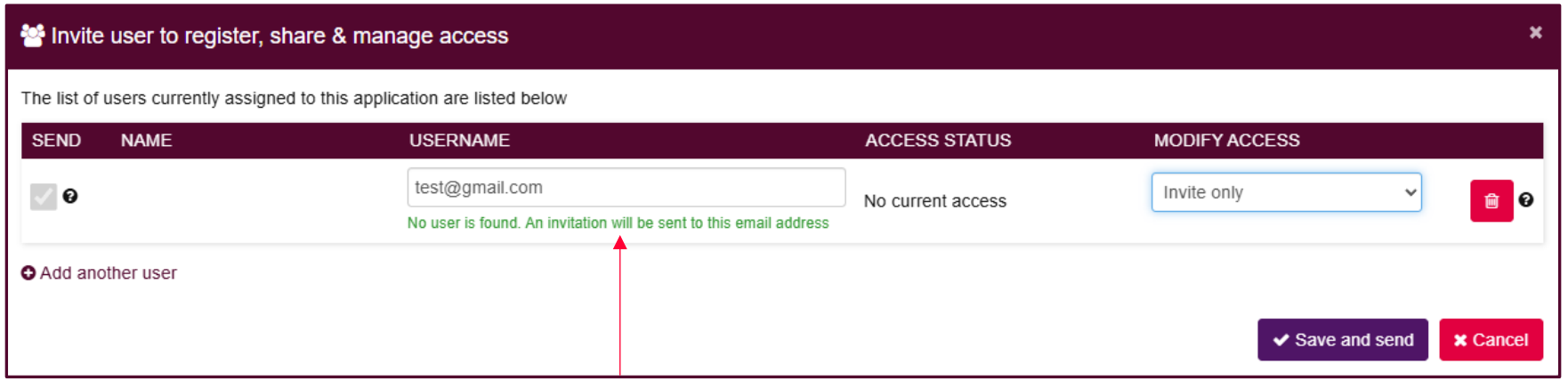


Inviting Additional People to Access the Application

Once the application has been started, additional individuals can be invited to help develop or check the application before submission, whether they are going to have a specified role in the application or not. Users can be added using the invite user button at the top right of the screen when you have an application form open:



This opens the following popup:



To add someone please fill in their email address in the USERNAME box and then click away from the box. The system will then search for an active account with that email address and let you know using the green text below the box whether one has been found or not. It is not a problem either way, the individual can still be added.

You can give individuals 'view' or 'edit' permissions using the drop-down menu under MODIFY ACCESS. Using 'invite only' when inviting new individuals to register on the system, will only mean they are invited to create an account and will not add them to the application, so is not recommended.

Once you have added their email address and picked their access level you can press 'save and send'.

If an individual you want to share an application with is an existing Blood Cancer UK Grants Portal account holder, they will be emailed automatically once you click save and send to let them know you have given them access. Your application will then be listed in appear in their Grants Portal account. If they have not logged in before they will just need to follow the instructions on slides 3-5.

If an individual you want to share an application with does not have a Blood Cancer UK Grants Portal account, once you click save and send the system will email them with an invitation to register and inform them that you have shared an application with them. Your application will then be listed in their Portal account once they have registered.

NOTE: in this section you do not define the individual's role (Co-applicants, Co-investigators, Department Head, Pre-award Administrators etc) but you will need to specify those roles on the application form itself in the sections 'Additional Applicants' or 'Administrators and Signatories'. **This can only be done after individuals have been added to the application as outlined above – more details are provided on the next slide.**

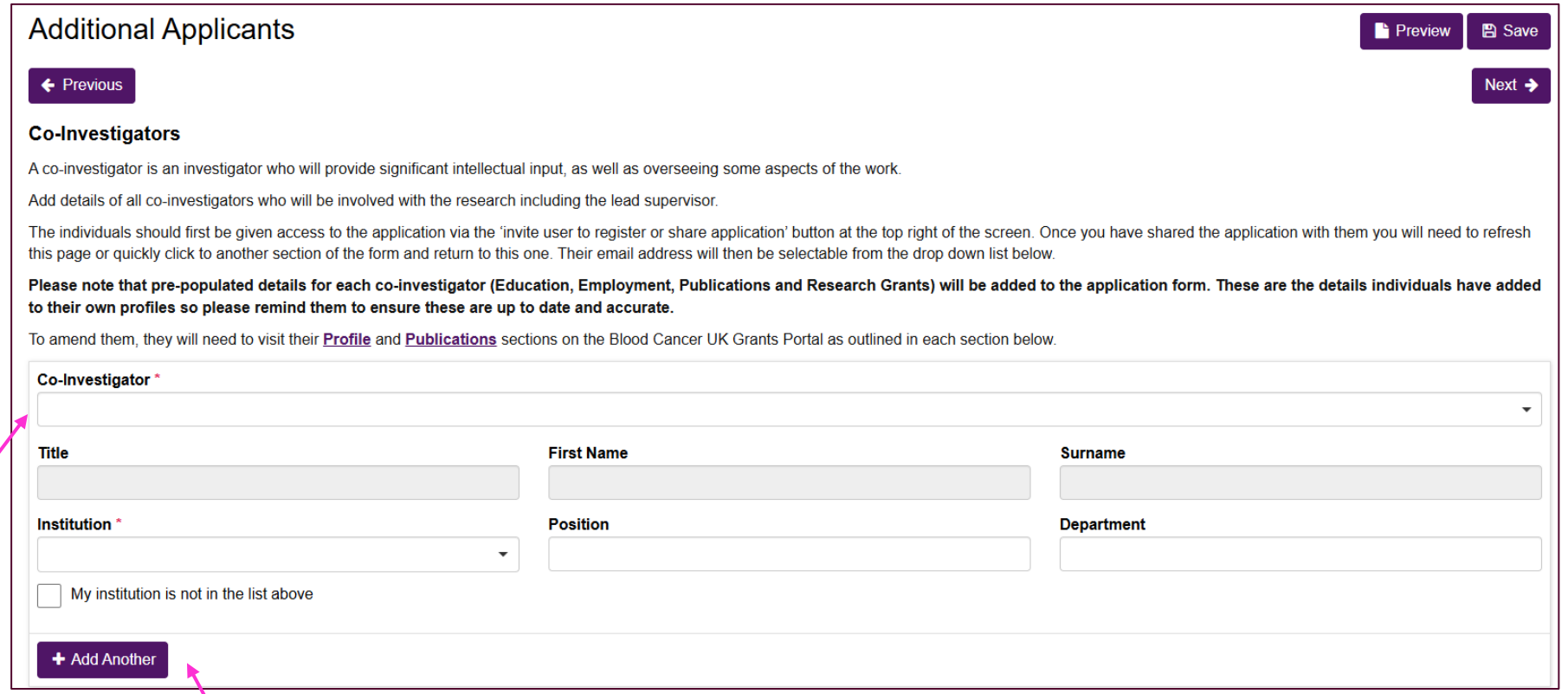
Adding people to specified roles

After individuals have been invited to access the application, you will be able to add them to specified roles in the relevant sections of the application form: Additional Applicants or Administrators and Signatories. This guidance is based on the Early Advancement Fellowship scheme. Other forms may vary slightly but work in a similar way.

1. Before you specify further applicants, you must share your application with them following the guidance on the previous slide so the system can link them to your form.

2. Once you have shared your application with them if you are on the additional applicants or administrators and signatories page you need to refresh the page.

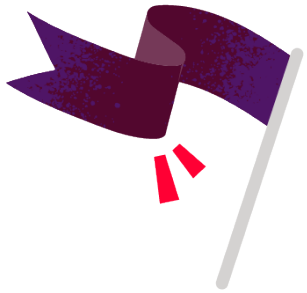
3. Then go to the relevant applicant type and click on the first box. A list of all those you have linked the form with will appear. Simply choose the correct individual and their information will be populated in the relevant boxes.



4. Where a category allows for more than one applicant of that type ie. Co-investigators, Collaborators, Administrators, click on the 'Add Another' box to add further individuals.

Submission Process

After checking that the form is complete, lead applicant presses 'submit' on the attachment summary page



Email notification is sent automatically to both signatories to log into the Grants Portal and approve the application

Signatories check and approve the application or return it to the applicant for edits

The application is only formally submitted to Blood Cancer UK once both signatories have approved the application. This must be completed before the 3pm deadline

Blood Cancer UK staff will validate the application. Applicants will be informed their application has passed initial eligibility checks and is under review

Guidance for Signatories – Logging in

Ahead of the submission deadline please check you can log in to the Grants Portal account the lead applicant has registered as the signatory for the application.

If you have logged to the Grants Portal before simply add your username (email) and password here and click Log In.

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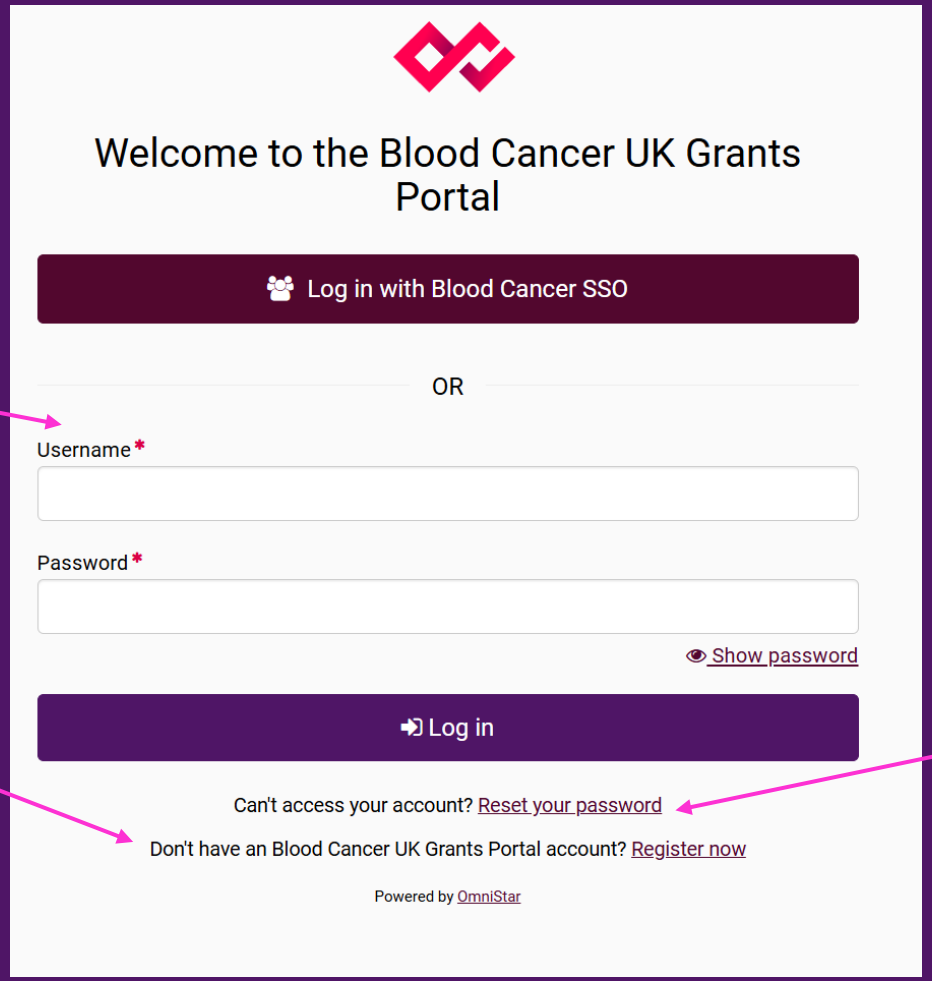


FIRST TIME USERS

If you **do** have an existing Grant Tracker account an account on the new Grants Portal will have been automatically created for you.

The first time you navigate to the login page you will need to reset your password here to set up a new password for the Grants Portal. Your existing password for Grant Tracker will remain unchanged.

If you ever forget your password, you can always reset it here.

Receiving the approval emails

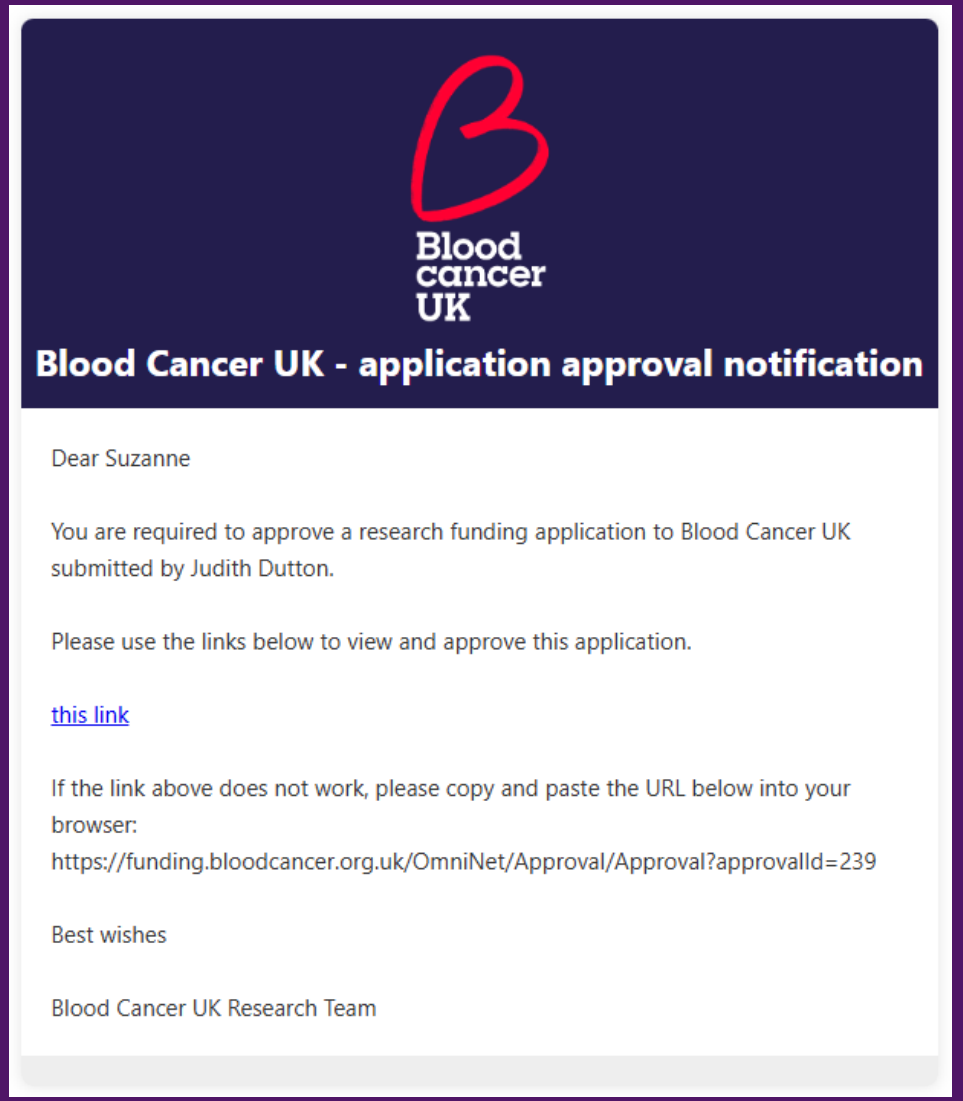
When the lead applicant has completed all sections of the application they will click ‘submit’ in their account.

The system will automatically email the signatories asking for their approval.

Emails from the system come from funding@bloodcancer.org.uk with the subject: **Blood Cancer UK - application approval notification.**

The email contains a direct link to the approval page or a link you can copy and paste.

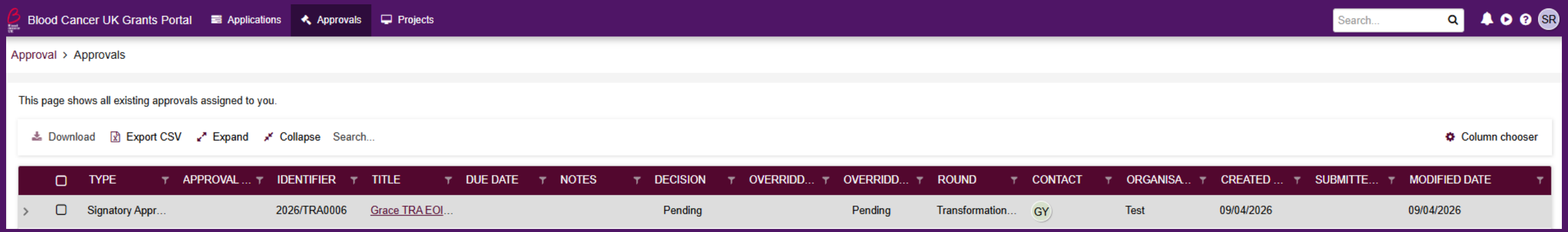
If you don’t receive the email, please ensure it isn’t in your spam folder and if you still can’t locate it follow the guidance on the next page to approve in your account without the email.



Approving via your online account

If an applicant has told you they have submitted the application and that you now need to approve the application but you haven't received the approval email, you can still complete the approval by logging into your online account.

Once logged in in the top menu bar you will see an approvals tab. Clicking that tab will show you the following screen with all applications currently pending your approval:

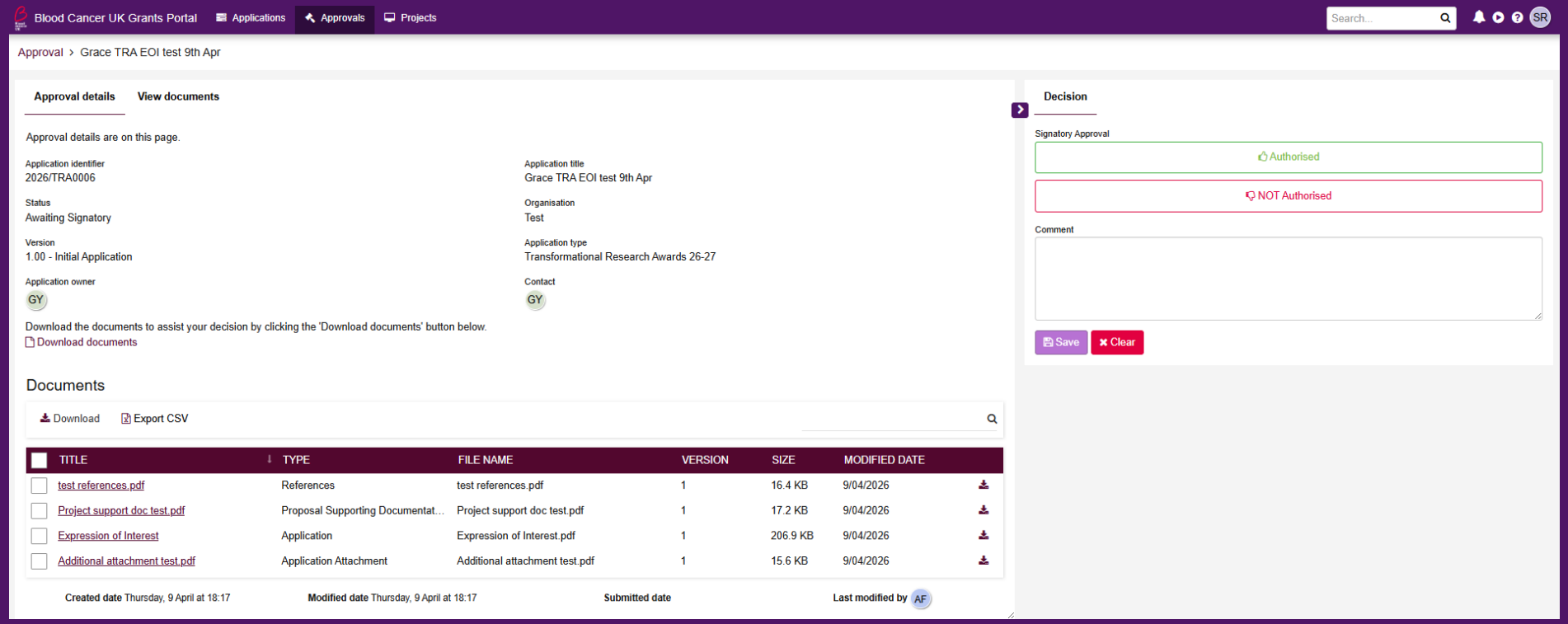


Click on the title of the relevant application and it will take you to the approvals page.

Completing the approvals

Once you have reached the approvals page via the email or your own portal account you will see the key details of the application on the left. To read the application or associated documents these can be accessed in the bottom left.

If you are happy to approve, click the green ‘authorized’ box on the right-hand side and click save. Your role is now completed.

If you are not happy to approve you can click the red ‘not authorized’ box and provide comments for the applicant. Clicking save will return the application with your comments to the applicant who can then make changes and resubmit the application. When they resubmit the application, it will come back again to you for approval.

Note: applications are sent simultaneously to both signatories. If one signatory does not authorize the application, once the applicant has made the required changes and resubmitted the application, it will return to both signatories for re-approval.